CHAPTER 2: INSTALLING THE PBP & PREPARING FOR DATA ENTRY

INSTALL PBP

For PCs with the Windows NT, 2000 or XP operating system, a user with Administrator group membership should perform this installation. Please note that earlier releases of the PBP (e.g., PBP 2003) do not have to be removed prior to the installation of PBP 2004. However, PBP 2004 should be installed to a different directory by accepting the default location below. Earlier releases of the PBP should be treated as completely independent entities. Do not attempt to intermix files, data, or programs. Because the PBP is significantly different across years, it is not possible to populate PBP 2004 with earlier releases of the PBP data.

Please note that if you had installed a previous version of the PBP 2004 software, such as the Beta version, you must completely uninstall the previous version prior to installing the current version. For instructions on uninstalling the PBP software, please refer to the uninstallation directions in this User's Manual or by selecting **Step 2: Installation and Uninstallation Instructions** from the ACR/PBP 2004 Start Page.

Step 1: Using Windows Explorer, navigate to your temporary directory and locate the SETUPPBP2004.EXE file.

Step 2: Double-click on the SETUPPBP2004.EXE file. There may be a brief delay between the time when the file is double-clicked and the install program begins.

Step 3: The first window is the "Welcome to InstallShield Wizard for PBP 2004" window and it may recommend that all other Windows programs be closed before continuing. If so, close all other Windows programs and then click on the **Next** button.

Step 4: The second window is the "PBP 2004 Disclaimer" window. Read the disclaimer and click on the **Yes** button to acknowledge and continue the installation.

Step 5: The third window is the "Choose Destination Location" window. Near the bottom of the window, a default value is provided for the "Destination Folder". The "Destination Folder" is the location at which the PBP 2004 software will be installed. The recommended action is to accept this default location. Write down this location for future reference. (This location will be needed in order to complete Part 2 of the installation.) To accept the default location, click on the **Next** button.

Step 6: The fourth window is the "Select Program Folder" window. This is the location at which the PBP 2004 software will be accessed from the "Start" button. The default program folder is "PBP 2004". This is the recommended program folder. Click on the **Next** button to continue.

Step 7: The install program should now begin installing the PBP 2004 software. Please wait until installation is completed. If prompted to overwrite any existing files, click **"Yes"** to overwrite.

Step 8: When installation is completed, the "InstallShield Wizard Complete" window will be displayed. If the computer needs to be restarted, notification will be given accordingly. If restart is required, the user may either restart immediately or restart later. The recommended action is to use the default and restart immediately. Click on the **Finish** button to exit the install program and restart your computer.

When Windows restarts, there will be a delay during which your computer may appear to be "frozen". This is normal. Do nothing and wait until Windows has completed the startup. If Windows requires a login, this delay may occur after logging in to Windows.

The PBP software should now be fully installed and ready to use.

UPDATING PLAN INFORMATION

After successfully completing the download and installation of your ACR and PBP 2004 software, it is recommended that you check the pre-populated plan information in your ACR and PBP 2004 application to ensure that what you entered in the HPMS was accurate for your organization. If you discover that you need to modify your plans, you have the capability to update them by using the "Update Plan Information" function on the PBP Management Screen. Medicare MCOs should refer to the section "Edit Plan Specific Information" earlier in this chapter for the instructions on updating plan information.

However, please note that the information in the ACR is only populated at the time the spreadsheet is created. Any subsequent updates to the HPMS information will not be automatically reflected in the ACR; any updates will need to be made manually to the ACR.

LOG INTO PBP

The user can log into the PBP module by entering the User ID in the *User ID* text box and pressing the <ENTER> key. To exit the **Login** screen without actually logging into the system, click on the <**X**> in the upper right corner of the screen.

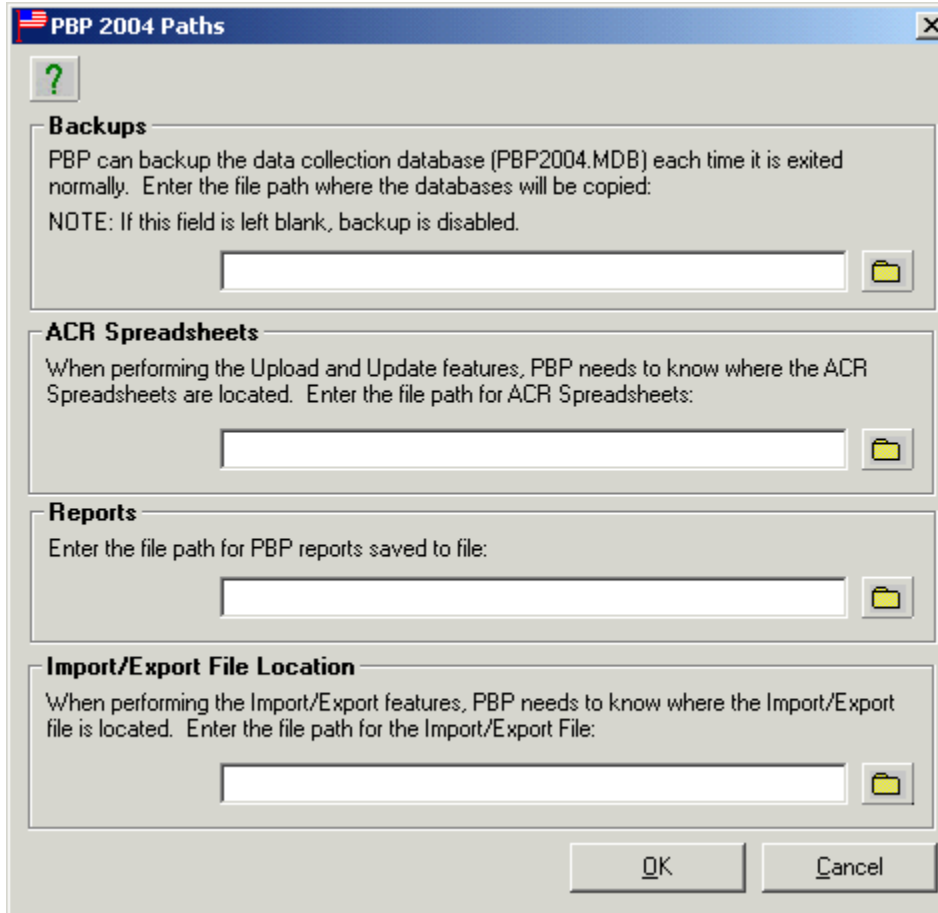## SET UP THE AUTOMATIC BACKUP FUNCTION

The user will be prompted to set the automatic backup function:
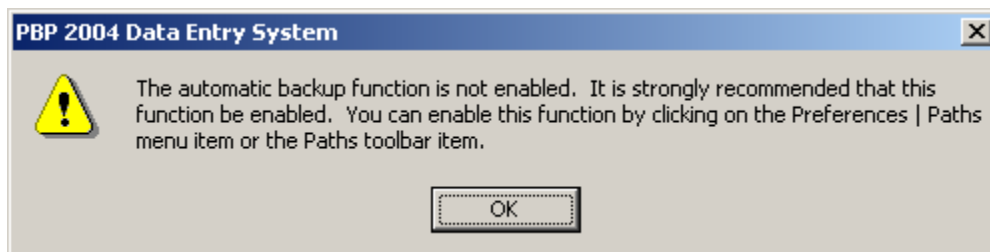
STEP 1: SELECT "PATHS" MENU OPTION

PBP has the option to make a backup copy of the data collection database (PBP2004.MDB) each time the user exits PBP normally. If the database is corrupted due to abnormal termination of PBP (e.g., power failure, system lockup), the user can copy the backup database into the installation directory and only the last PBP session will be lost. To enable the **Backup** function,

from the **PBP 2004 Management Screen** select the Paths option from the PREFERENCES menu or click on [icon] in the toolbar to display the **PBP 2004 Paths** screen.

STEP 2: SPECIFY LOCATION
On the PBP Paths screen the user can specify a directory location for the backup files. Note that this directory cannot be the same directory where the application and databases currently reside. Also, if a path is not provided, the backup option is disabled.

Once a path has been specified, when PBP is exited normally, the data will be backed up to the designated directory in a zip file called PBP2004.ZIP. The second time a PBP session is exited, the original PBP2004.ZIP file will be renamed (i.e., OLDPBP2004.ZIP) and moved to the installation directory of the PBP software and the new PBP2004.ZIP will be saved. From that point forward, the process will repeat itself, supplying the user with the two most recent sessions of the PBP database.

The backup process should be completed to a network drive, a removable drive, or, for smaller files, a floppy disk. If possible, do not backup the files to a user's local hard drive.

The PBP **Backup** capability is no substitute for a comprehensive backup strategy. It is HIGHLY RECOMMENDED that PBP users institute a regular procedure of backing up the database to a reliable media.

NOTE: Since the backup files are compressed, to recover the data, the user will need to have a program that can decompress ZIP-compatible files.

## CONFIGURE PBP TO OPERATE IN A NETWORK ENVIRONMENT

The PBP software can be configured to operate in a multi-user, network environment. This configuration consists of multiple PCs accessing the same data collection and plan information databases (PBP2004.MDB and PBPPLANS2004.MDB) located on a shared drive on a network file server. Each of the PCs must have the PBP software installed. Note that the PBP software cannot be installed on the file server and the databases cannot be located on a shared drive on a PC.

STEP 1: SET UP SUPER USER INSTALLATION

Complete all the steps to install the PBP on the Super User's PC. The Super User is the user who specified the plan information on the HPMS Web site and downloaded the installation files SETUPPBP2004.EXE and UPDATPBP2004.ZIP.

STEP 2: MOVE DATABASES

The **Network Configuration** function provides a user with the capability to move the system databases, PBP2004.MDB and PBPPLANS2004.MDB, to a shared location on a network. After logging into the system, access the **Network Configuration** function by clicking on the ACTIONS menu item and selecting the Network Configuration option or clicking on [icon] in the toolbar. The **PBP 2004 Network Configuration** screen will be displayed.
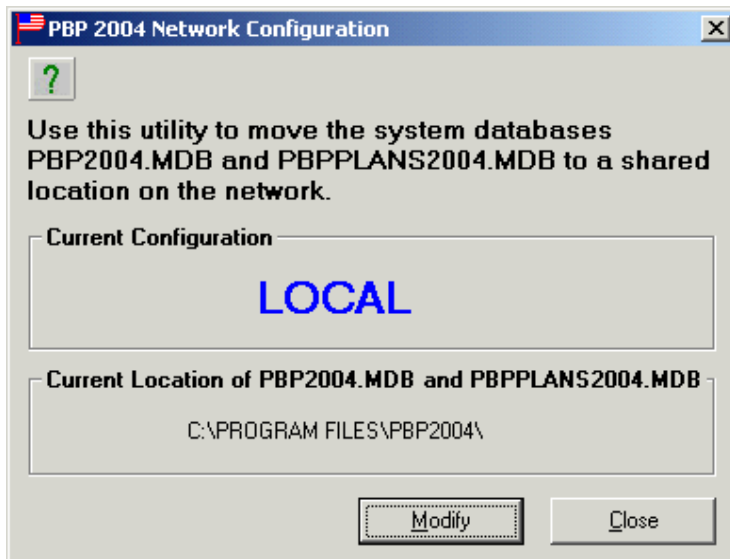
The **PBP 2004 Network Configuration** screen describes the current configuration (Local or Network) and the current location of the system databases. When setting up a network configuration, it is required that a shared drive on a network file server be used. Do not use a shared local drive on a PC; this type of configuration is not supported.

To move the system databases, click on the <MODIFY> button to display the **Select Directory** screen. Select the desired Local or Network drive and directory and click on the <OK> button.
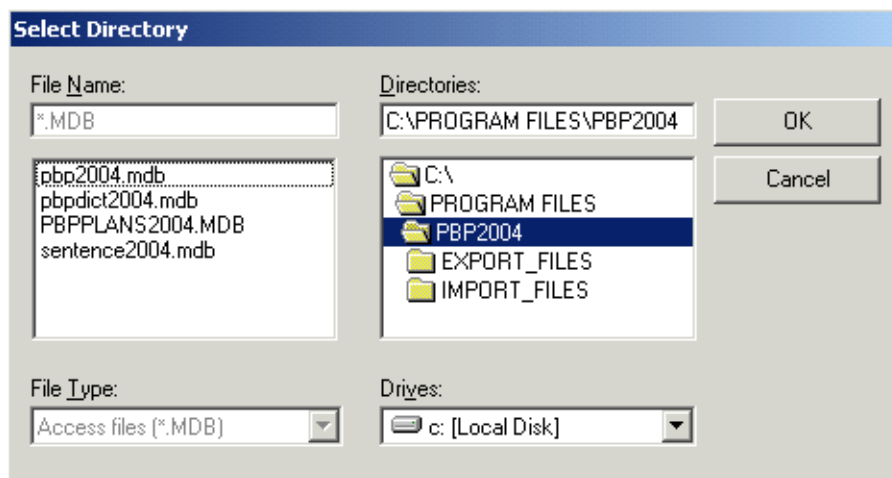
After clicking on the <OK> button, the **PBP 2004 Network Configuration** screen will display the new configuration and location of the databases. Click on the <CLOSE> button to return to the **PBP 2004 Management Screen**.

STEP 3: CREATE DATA ENTRY USERS

The Super User should log into the software and establish Data Entry users. Note that the Data Entry users do not need to have HITS User IDs. The Data Entry User IDs may follow any naming convention that the Super User decides is appropriate. In addition, these User IDs are only available locally; they are not available on HPMS and cannot be used to log into the HPMS Web site.

In a multi-user, network environment, it is strongly recommended that the Super User create separate User IDs for each data entry person. Access the **User Maintenance** function to create data entry User IDs. The PBP software contains safeguards and features that protect the integrity of the data and make it easier for the Super User to monitor the user environment. These safeguards and features would be invalidated if all users shared a single User ID; therefore, the sharing of a single User ID for all users is strongly discouraged.

The **User Maintenance** function provides the Super User with the capability to add or delete a data entry user. Click on in the toolbar or select the User Maintenance option from the ACTIONS menu item to display the **PBP 2004 User Maintenance** screen. A list of the current Data Entry Users will be displayed as well as the Super User.

PBP 2004 User Maintenance

File   Help

Data Entry Users

john

Add

Delete

Super User

pbp
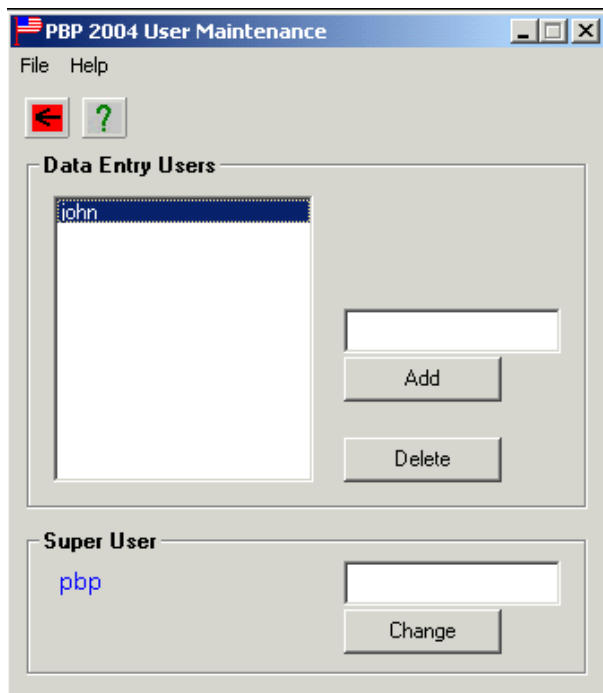
Change

To add a data entry user, enter a name in the *Data Entry User* text box (e.g., up to 10 characters) and click on <ADD>. To delete a data entry user, select a name from the list and click on <DELETE>.

The **Change** function should be used only when the current HPMS Super User's H Numbers and Plans will be assigned to another Super User. The HPMS Help Desk should be consulted to verify and describe the process for the **Change** function.
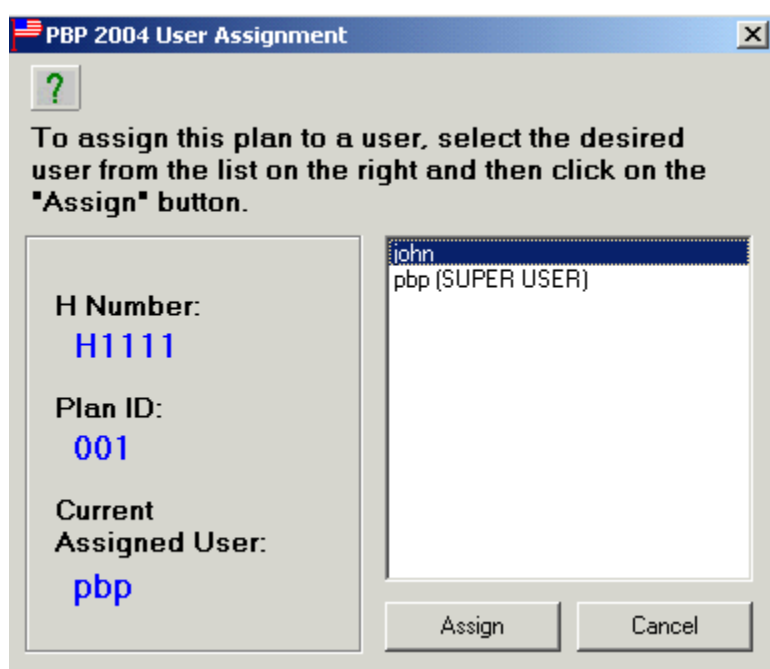
To exit to the **PBP 2004 User Maintenance** screen, click on the arrow <RETURN TO MANAGEMENT SCREEN> toolbar button or select the Return to Management Screen option from the FILE menu item.

STEP 4: ASSIGN PLANS TO DATA ENTRY USERS

The **Assign Plan** function provides the Super User with the capability to assign a plan to a specific user. After selecting a plan in Section A of the **PBP 2004 Management Screen**, click on

in the toolbar or select the Assign Plan option from the ACTIONS menu item to display the **PBP 2004 User Assignment** screen. The H Number, Plan ID, and Currently Assigned User are displayed on the **PBP 2004 User Assignment** screen for the selected plan. If no one is currently assigned to the selected plan, *None* will be displayed in the **Current Assigned User** field.

Select a user from the list and click on <ASSIGN>. The user will be returned to the **PBP 2004 Management Screen** where the assigned user will be displayed under the **Assigned User** field for the selected plan.

Once a user is assigned to a plan, only the assigned user can complete data entry for that plan.

STEP 5: SET UP DATA ENTRY USER INSTALLATION
For each Data Entry user, the Super User should complete all the installation steps on the Data Entry user's PC. Do not complete the steps of downloading the plan-specific information.

After installing the software, run the PBP software. The software will recognize that the PBPPLANS2004.MDB does not exist and will ask for the type of installation. Select the Data Entry User option for databases on the network and click on the <OK> button.

PBP will next ask for the location of the system databases. This location should be the same as the location specified by the Super User in Step 2 of this section. The system will now reference the databases in this location.

SHARE PBP WITH USERS OUTSIDE MY NETWORK

The **Import/Export** function provides the user with the ability to transfer plans to and from a data entry person in a remote area, such as another state. This function should be used when the data entry person does not have access to the same network as the Super User.

STEP 1: CREATE DATA ENTRY USERS

The Super User should log into the software and establish Data Entry users. Note that the Data Entry users do not need to have HITS User IDs. The Data Entry User IDs may follow any convention that the Super User decides is appropriate. In addition, these User IDs are only available locally; they are not available on HPMS and cannot be used to log into the HPMS Web site.

The **User Maintenance** function provides the Super User with the capability to add or delete a data entry user. Click on [icon] in the toolbar or select the User Maintenance option from the ACTIONS menu item to display the **PBP 2004 User Maintenance** screen. A list of the current Data Entry Users will be displayed as well as the Super User.

STEP 2: ASSIGN PLANS

The **Assign Plan** function provides the Super User with the capability to assign a plan to a specific user. After selecting a plan in Section A of the **PBP 2004 Management Screen**, click on [icon] in the toolbar or select the Assign Plan option from the ACTIONS menu item to display the **PBP 2004 User Assignment** screen. The H Number, Plan ID, and Currently Assigned User are displayed on the **PBP 2004 User Assignment** screen for the selected plan. If no one is currently assigned to the selected plan, *None* will be displayed in the **Current Assigned User** field.

Select a user from the list and click on <ASSIGN>. The user will be returned to the **PBP 2004 Management Screen** where the assigned user will be displayed under the **Assigned User** field for the selected plan.

Once a user is assigned to a plan, only the assigned user can complete data entry for that plan.

STEP 3: SELECT "IMPORT/EXPORT" MENU OPTION

From the **PBP 2004 Management Screen**, select the **Import/Export** function from the ACTIONS menu or click on [icon] in the toolbar.

STEP 4: ENTER LOCATION OF EXPORT FILE

On the **Import/Export** screen, the **Export** option will already be selected by default. Enter the directory of where the export file is to be created. Be sure to enter the full pathname, and then click on <Next>.

STEP 5: SELECT PLAN(S) TO EXPORT

In the **Select Plan(s)** section, highlight the plans(s) to be exported and click on <Next>.

A confirmation screen will appear verifying that the export file named PBP2004IE.ZIP was created and giving the pathname and directory. Transfer this file to the appropriate data entry user via email as an attachment or mail it on a floppy disk.

NOTE: The **Open** status for **Exported** plans is turned **ON**. An asterisk will appear under the **Open** column next to the exported plans on the **PBP 2004 Management Screen**. The PBP system will not allow access to a plan while the **Open** status is turned **ON**.

STEP 6: PROVIDE INSTRUCTIONS TO DATA ENTRY USER

The data entry user will need to be instructed on how to install PBP and how to create an **Export** file to return the plan(s) after data entry has been completed.

- ➢ **Step 6A**: The data entry user will need to install PBP on his/her computer. If the data entry user does not have access to the HPMS Web site, he/she can download the software and installation instructions from *www.cms.hhs.gov/healthplans/acr/default.asp*.
- ➢ **Step 6B**: The data entry user should save the export file PBP2004IE.ZIP in their PBP application directory, which is the location where PBP was installed.
- ➢ **Step 6C**: The data entry user should launch PBP. The system will recognize the PBP2004IE.ZIP file and will automatically import the data.
- ➢ **Step 6D**: The data entry user should complete data entry.
- ➢ **Step 6E**: The data entry user should create a file using the Export function and return it to the Super User. Follow the *Export Plans* instructions provided in the beginning of this section.

The Super User should use the Import/Export function to import the data from the data entry user. In addition, in the future, if any other export files are sent to the data entry user, the file will have to be imported using the Import/Export function. Follow the *Import Plans* instructions provided in this section.

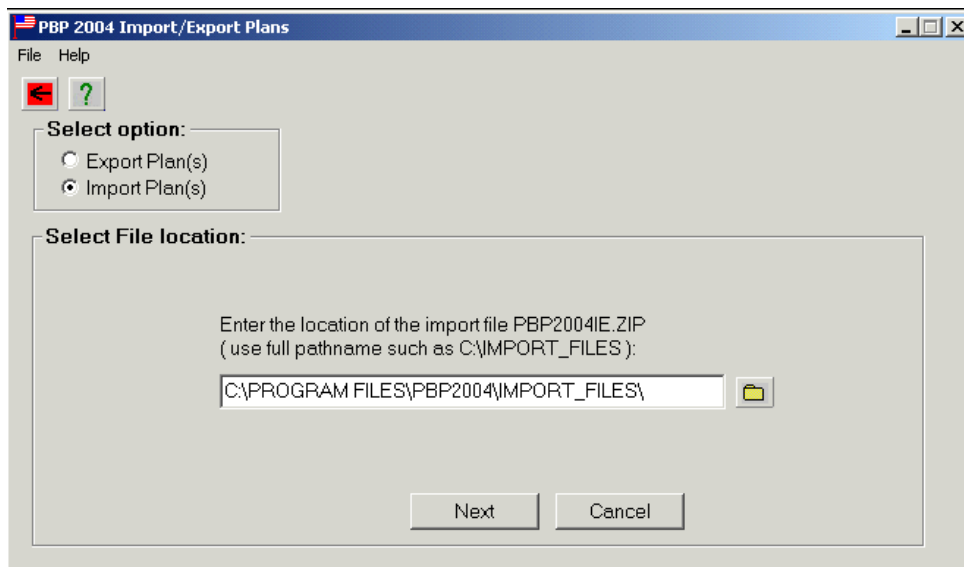### IMPORT PLANS

STEP 1: SELECT "IMPORT/EXPORT" MENU OPTION

From the **PBP 2004 Management Screen**, select the **Import/Export** function from the ACTIONS menu or click on ⟨icon⟩ in the toolbar.

STEP 2: SELECT IMPORT PLAN(S) OPTION

On the **Import/Export** screen, select the **Import Plan(s)** option.

STEP 3: ENTER LOCATION OF IMPORT FILE

Enter the directory where the **Import** file is located. Be sure to enter the <u>full</u> pathname, then click on <Next>.

STEP 4: SELECT PLAN(S) TO IMPORT

In the **Select Plan(s)** section, highlight the plans(s) to be imported and click on <Next>. The PBP system automatically unzips the file named PBP2004IE.ZIP containing the two databases unique to the specific plan(s) being imported.

After a confirmation screen appears verifying that the **import** was completed, click on <OK> to return to the **PBP 2004 Management Screen**.